

Service Request Management

Customer User Guide
SRM version 2.1

Contents:

- Introduction
- Service Request Creation
- Service Request follow-up and communication
- Reporting
- User Preferences
- Scan and Capture service specific Service Requests
- Multi-company features for Extended Support customers
- Standard SaaS service specific Service Requests



Service Request Management (SRM)

Web based tool

- Service Request recording, follow up and communication with Basware
- User Interface is in English

Visibility to the Service Requests

- All Service Requests that are reported by SRM users (=have login to SRM) are visible for all customer's SRM users.
- All customer users can add questions and comments to their Service Requests
- Only Service Request submitter can:
 - Receipt SRs from the 'Needs attention' listing
 - Cancel the Service Request
 - Reopen completed SR for further investigation if the resolution is not acceptable

Personal settings

- Users can change the password and set preferences

SRM Overview Console

- 1) Quick links to all Submitted requests
- 2) Link to SRM Home
- 3) Showing Service Requests with selected search criteria
- 4) Adding notes and attachments to the Activity log
- 5) Activity Log shows the communication between customer and Basware
- 6) Link to Basware Customer Support Contact details
- 7) Link to Help pdf file (=Customer User Guide)
- 8) Refresh the screen
- 9) Incident search with Incident ID

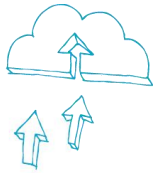
The screenshot displays the Basware SRM Overview Console interface. The top navigation bar includes the Basware logo, a welcome message for 'Susanne S Sweden', and links for 'Help' and 'Logout'. The left sidebar contains a 'Submitted Requests' section with links to 'Needs Attention' (16), 'Drafts' (0), 'Since Last Visit' (0), and 'Open Requests' (16). Below this are links for 'Popular Services', 'Browse Catalog', 'Preferences', and 'Reporting'. An 'Incident ID+' search field is located at the bottom of the sidebar. The main content area features a 'Submitted Requests' table with columns for Request Number, Request Name, Status, Product / Ser..., Requested F..., Submit Date, and Last ... A dropdown menu labeled 'Show' is set to 'All Open Requests'. Below the table is a 'Summary For: INCBW0000004721' section. The bottom of the interface includes a 'Notes' section with a text area and an 'Add' button, and an 'Activity Log' section showing a timeline of messages and attachments. At the very bottom, there are buttons for 'Request Details', 'Complete Request', 'Cancel', and 'Reopen'.

Request Number	Request Name	Status	Product / Ser...	Requested F...	Submit Date	Last ...
INCBW0000004708	Summary France	Assigned		gareth@test.fff	12.12.2012 10:41:59	
INCBW0000004709	Summary US	Assigned		ali@test.zzz	12.12.2012 10:44:49	
INCBW0000004710	Summary Finland	Assigned		jon@test.zzz	12.12.2012 10:45:44	
INCBW0000004713	SP (netherlands)	Assigned		gareth@b.zzz	12.12.2012 10:53:39	
INCBW0000004715	Summary Netherlands	Assigned		gareth@b.zzz	12.12.2012 12:04:22	
INCBW0000004716	Summary Denmark 2	Assigned		elif@ggg.ttt	12.12.2012 12:05:27	
INCBW0000004717	Summary Norway 2	Assigned		elif@ggg.ttt	12.12.2012 12:06:54	
INCBW0000004718	Summary US 2	Assigned		ali@test.zzz	12.12.2012 12:07:50	
INCBW0000004719	Summary Finland 2	Assigned		jon@test.zzz	12.12.2012 12:08:41	
INCBW0000004721	Summary Germany 2	Assigned		gareth@test.vvv	12.12.2012 12:10:38	
INCBW0000004722	Summary France 2	Assigned		gareth@test.fff	12.12.2012 12:11:34	

Activity Log:

- 27.12.2012 15:28:38 ; Puro-Grönblom Johanna (johannap)
This message from the Service Desk
- 14.12.2012 17:35:07 ; Ali E United States (ali@test.zzz)
I will contact you today regarding this issue
- 14.12.2012 17:32:39 ; Ali E United States (ali@test.zzz)
Please find some additional information from the attachment
[Attachment 3.docx](#)

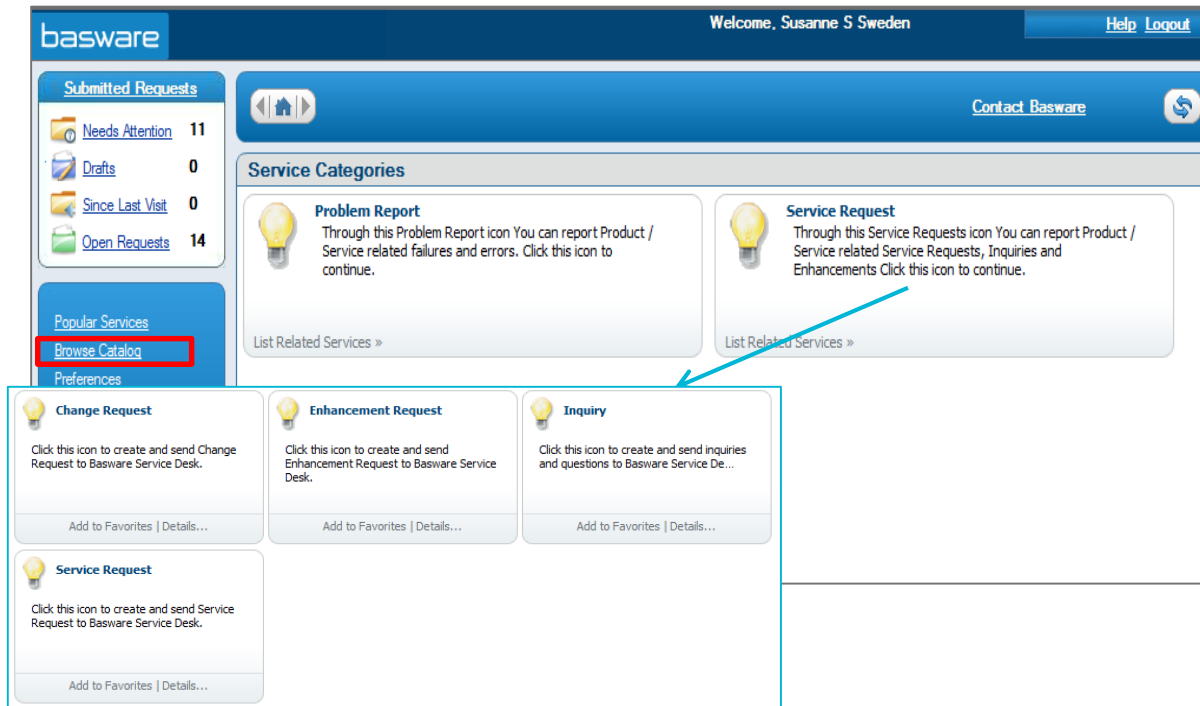
Service Request Creation



Select the Service Request

To create a Service Request, click Browse Catalog.

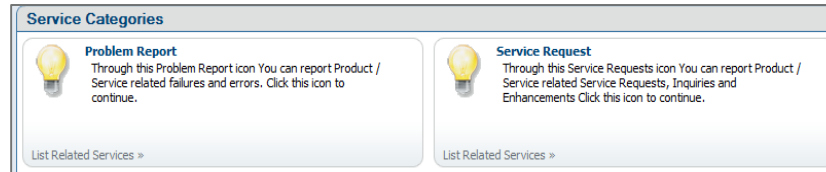
Select the desired Service Request type from the Service Categories by clicking the icon.



Available Service Requests

Service Categories that are available in SRM may differ per Service / Product.

Basic Service Categories and Service Requests that are available for all users are:



Problem Report	
Error report	Expected result did not occur or error message occurred
Service Request	
Service Request	Requests related to Basware products and services, e.g. requesting user accounts, additional licenses etc.
Inquiry	Inquiries and questions regarding Basware products and services
Enhancement Request	Enhancements and improvement suggestions related to Basware products and services
Change Request	Change Requests related to Basware installations and configurations.

Fill Service Request Details 1/2

Fill in Service Request fields:

Summary = brief summary of the issue

Description = Describe what has happened and how that can be reproduced

Product / Service selection = Select the right Product / Service from the selection list

Impact and Urgency = Select the value from the selection list. See descriptions below:

Error Report

Name: Marika Virtanen

Summary*

Description*

Your text

Product / Service selection*

Impact*

Urgency*

Add Attachment Summary Save As Draft Submit

Incident impact on customer's business:

1-Extensive/Widespread	Majority of users are affected by the issue.
2-Significant/Large	25-50% of overall users or the majority of users in a single office are affected by the issue. No work-around available.
3-Moderate/Limited	25-50% of overall users or the majority of users in a single office are affected by the issue. Work-around is available.
4-Minor/Localized	Minimal number of users of the product or service is affected by the issue.

Incident urgency to customer's business:

Critical	Whole customer production system is out of use and there is no work-around available.
High	Many key functionalities under normal conditions or important software component is unusable or frequent failure of important service and there is no work-around available.
Medium	Reduced functionality due to error affecting the overall customer system or degradation of system performance or infrequent interruptions to system availability and there is a work-around available.
Low	A non-significant effect on the functionality of the product or service. Technical questions, comments or proposals for improvement of the product.

Fill Service Request Details 2/2

1) Add related logs, screen shots and other attachments by clicking Add Attachment.

After the attachment has been added you can Delete, Display or Save the attachment to the Disk.

More attachments can be added by selecting Attachment2 /3 row and then adding the file.

2) Save the SR as a Draft or Submit to Basware Service Desk.

SR is created with the status 'Draft' or it is opened as a new Service Request with the status 'Planning'.

The image illustrates the process of adding attachments and saving a service request in the Basware Service Desk system.

Step 1: Error Report Form

The 'Error Report' form shows the user 'Marika Virtanen'. It includes fields for 'Summary*', 'Description*', 'Product / Service selection*', 'Impact*', and 'Urgency*'. At the bottom, there are two buttons: 'Add Attachment' (highlighted with a red box and labeled '1') and 'Save As Draft' / 'Submit' (highlighted with a red box and labeled '2').

Step 2: Attachments Table

The 'Attachments' table shows the following data:

File Name	Max Size	Attach Label
		Attachment
		Attachment2
		Attachment3

An 'Add' button is highlighted with a red box. A red arrow points from this button to the 'Add Attachment' dialog.

Step 3: Add Attachment Dialog

The 'Add Attachment' dialog shows a 'Browse...' button and an 'OK' button (highlighted with a red box). A red arrow points from the 'OK' button to the final 'Attachments' table.

Step 4: Final Attachments Table

The final 'Attachments' table shows the following data:

File Name	Max Size	Attach Label
Attachment 2.docx	10 KB	Attachment
		Attachment2
		Attachment3

Buttons 'Add', 'Delete', 'Display', and 'Save to Disk' are visible below the table. The 'Save' and 'Close' buttons are at the bottom.

Basware Logo

Service Request Details

After the Service Request has been submitted, its details can be viewed from the Request Details:

- **Details tab** shows Request details that have been added when creating the Request.
- Attachments added by the customer are shown in the **Activity log tab**.

Note! Service Request's current priority and status are shown in the details.

The screenshot displays the BMC Software Request Details interface. The main window is titled "Request Details (bwtmsg1.basware.com) - Windows Internet Explorer". It features a "Submitted Requests" table with columns "Request Number" and "Request Name". The table lists several requests, with "INCBW000004721 Summary Germany 2" highlighted. Below the table, the "Summary For: INCBW000004721" is shown. The "Notes" section contains a text area with the placeholder "type your activity log text here". The "Attachment" section shows three fields for "Attachment 1", "Attachment 2", and "Attachment 3", each with a file icon and a plus sign. The "Request Details" button is highlighted with a red box. A red arrow points from the "Request Details" button to the "Activity Log" tab in the "Request Details (429258-pictor) - Windows Internet Explorer" window. The "Activity Log" tab shows a list of activity log entries, including "14.12.2012 12:32:39 : All E United States (all@test.zzz)" and "Please find some additional information from the attachment". The "Attachment 3.docx" file is listed as an attachment. The "Request Status" is shown as "Assigned".

Request Number	Request Name
INCBW000004722	Error Report
INCBW000004721	Summary France 2
INCBW000004720	Summary Germany 2
INCBW000004719	Summary Sweden 2
INCBW000004718	Summary Finland 2
INCBW000004717	Summary US 2
INCBW000004716	Summary Norway 2
INCBW000004715	Summary Denmark 2
INCBW000004714	Summary Netherlands
INCBW000004713	Include Summary here
INCBW000004712	SP (netherlands)

Summary For: INCBW000004721

Notes:

type your activity log text here

Attachment 1: <File Name>

Attachment 2: <File Name>

Attachment 3: <File Name>

Add

Request Details

Complete Request

Cancel

Reopen

Service Request Follow Up and Communication



Service Request Status Options

Status options:

Draft -> not yet sent to Basware

Assigned -> Assigned to Basware Customer Support

Pending Basware -> Waiting actions from Basware

Pending Customer -> Waiting customer action

In Progress -> Basware is processing the request

Resolved -> Resolved by Basware, can be reopened by Service Request submitter if the resolution is not approved

Closed -> Closed and cannot be reopened. New Request to be created if needed.

Cancelled -> Customer has cancelled the Request. Request can be cancelled only by the Service Request submitter.

The screenshot displays the Basware Service Request interface. At the top, a blue header bar contains the 'basware' logo, a welcome message 'Welcome, Susanne S Sweden', and links for 'Help' and 'Logout'. Below the header, a sidebar on the left lists 'Submitted Requests' with icons and counts for 'Needs Attention' (16), 'Drafts' (0), 'Since Last Visit' (0), and 'Open Requests' (16). It also includes links for 'Popular Services', 'Browse Catalog', 'Preferences', and 'Reporting'. The main content area features a 'Submitted Requests' table with columns: Request Number, Request Name, Status, Product / Ser..., Requested F..., Submit Date, and Last ... The table lists several requests, with the status 'Assigned' highlighted. A red box highlights the 'Status options' dropdown menu, which lists the following status options: Draft, Assigned, Pending, Basware, Pending Customer, In Progress, Resolved, Closed, and Cancelled. Below the table, there is a 'Summary For:' section for request INCBW0000004721, a 'Notes' section with a text area, and an 'Attachment' section with three slots for file uploads. At the bottom, there are buttons for 'Request Details', 'Complete Request', 'Cancel', and 'Reopen'.

Request Number	Request Name	Status	Product / Ser...	Requested F...	Submit Date	Last ...
INCBW0000004708	Summary France	Assigned		gareth@test.fff	12.12.2012 10:41:59	
INCBW0000004709	Summary US			ali@test.zzz	12.12.2012 10:44:49	
INCBW0000004710	Summary Finland			jori@test.zzz	12.12.2012 10:45:44	
INCBW0000004713	SP (netherlands)			gareth@b.zzz	12.12.2012 10:53:39	
INCBW0000004715	Summary Netherlands			gareth@b.zzz	12.12.2012 12:04:22	
INCBW0000004716	Summary Denmark 2			eliff@ggg.ttt	12.12.2012 12:05:27	
INCBW0000004717	Summary Norway 2			eliff@test.zzz	12.12.2012 12:06:54	
INCBW0000004718	Summary US 2			ali@test.zzz	12.12.2012 12:07:50	
INCBW0000004719	Summary Finland 2			jori@test.zzz	12.12.2012 12:08:41	
INCBW0000004721	Summary Germany 2			gareth@test.vvv	12.12.2012 12:10:38	
INCBW0000004722	Summary France 2			gareth@test.fff	12.12.2012 12:11:34	

Service Requests in 'Needs Attention'

'Needs Attention' listing shows all Service Requests that:

- Include a note that is added by Basware Service Desk OR by some other user from the same company
- Have been resolved by Basware Service Desk

Please Note:

Service Request is removed from the Needs Attention list when:

- Service Request submitter (name in the Requested For column) has double clicked the Service Request open
- Submitter has added a new comment to the Service Request.

The screenshot displays the Basware Service Desk interface. At the top, the 'Submitted Requests' section is highlighted, showing a list of requests with columns for Request Number, Request Name, Status, Product / Ser..., Requested F..., Submit Date, and Last ... The 'Needs Attention' tab is selected, showing 16 requests. Below the list, the 'Summary For: INCBW0000004721' is displayed. The 'Notes' section contains a text area for activity log text. The 'Attachment' section shows three attachments with file names and icons. The 'Activity Log' section shows a list of activity log entries with timestamps and user names. The interface also includes a sidebar with 'Submitted Requests', 'Drafts', 'Since Last Visit', and 'Open Requests' counts, and a 'Popular Services' section with links to 'Browse Catalog', 'Preferences', and 'Reporting'.

Request Number	Request Name	Status	Product / Ser...	Requested F...	Submit Date	Last ...
INCBW0000004708	Summary France	Assigned		gareth@test.fff	12.12.2012 10:41:59	
INCBW0000004709	Summary US	Assigned		ali@test.zzz	12.12.2012 10:44:49	
INCBW0000004710	Summary Finland	Assigned		jon@test.zzz	12.12.2012 10:45:44	
INCBW0000004713	SP (netherlands)	Assigned		gareth@b.zzz	12.12.2012 10:53:39	
INCBW0000004715	Summary Netherlands	Assigned		gareth@b.zzz	12.12.2012 12:04:22	
INCBW0000004716	Summary Denmark 2	Assigned		elif@ggg.ttt	12.12.2012 12:05:27	
INCBW0000004717	Summary Norway 2	Assigned		elif@test.zzz	12.12.2012 12:06:54	
INCBW0000004718	Summary US 2	Assigned		ali@test.zzz	12.12.2012 12:07:50	
INCBW0000004719	Summary Finland 2	Assigned		jon@test.zzz	12.12.2012 12:08:41	
INCBW0000004721	Summary Germany 2	Assigned		gareth@test.vvv	12.12.2012 12:10:38	
INCBW0000004722	Summary France 2	Assigned		gareth@test.fff	12.12.2012 12:11:34	

Summary For: INCBW0000004721

Notes:
<type your activity log text here>

Attachment 1: <File Name>

Attachment 2: <File Name>

Attachment 3: <File Name>

Add

Activity Log:

27.12.2012 15:28:38 ; Puro-Grönblom Johanna (johannap)
This is the message from the Service Desk

14.12.2012 17:35:07 ; Ali E United States (ali@test.zzz)
I will contact you today regarding this issue

14.12.2012 17:32:39 ; Ali E United States (ali@test.zzz)
Please find some additional information from the attachment
[Attachment 3.docx](#)

Request Details Complete Request Cancel Reopen

Communication

Activity Log shows all Service Request related communication between customer users and Basware.

Customer gets a notification e-mail always when Note has been added to the Request or it has been Resolved.

Please Note! Notification is also sent about notes that are added by some other user from the same company.

The screenshot displays the Basware Service Request management interface. At the top, the 'basware' logo is on the left, and 'Welcome, Susanne S Sweden' with 'Help' and 'Logout' links is on the right. A left sidebar contains navigation links: 'Submitted Requests' (with sub-links for 'Needs Attention: 16', 'Drafts: 0', 'Since Last Visit: 0', and 'Open Requests: 16'), 'Popular Services', 'Browse Catalog', 'Preferences', and 'Reporting'. Below these is an 'Incident ID+' input field.

The main content area features a 'Submitted Requests' table with columns: Request Number, Request Name, Status, Product / Ser..., Requested F..., Submit Date, and Last ... The table lists several requests, all with a status of 'Assigned'. Below the table, a red box highlights the 'Summary For: INCBW0000004721' section. This section includes a 'Notes' field with a placeholder 'type your activity log text here', three 'Attachment' fields (labeled 'Attachment 1', 'Attachment 2', and 'Attachment 3'), and an 'Add' button. At the bottom of this section are buttons for 'Request Details', 'Complete Request', 'Cancel', and 'Reopen'.

To the right of the summary, the 'Activity Log' is displayed, showing a list of messages with timestamps and user names. The messages are:

- 27.12.2012 15:28:38 ; Puro-Grönblom Johanna (johannap)
This is the message from the Service Desk
- 14.12.2012 17:35:07 ; Ali E United States (ali@test.zzz)
I will contact you today regarding this issue
- 14.12.2012 17:32:39 ; Ali E United States (ali@test.zzz)
Please find some additional information from the attachment
[Attachment 3.docx](#)

Completed Service Request

Resolved Request:

If you approve the resolution you don't need to do anything. Request will be closed automatically by the system.

If you don't approve the resolution, you can reopen the Request, after which it is sent back to Basware. Include the reason to the Notes field.

Note! Reopening can be done only by the Service Request submitter.

Reopened Request has 'in Progress' status in Open Requests.

The screenshot displays the Basware Service Request management interface. At the top, a 'Submitted Requests' table lists several requests with their status and details. Below this, the 'Summary For: INCBW0000004749' form is shown, featuring a 'Notes' field, three attachment slots, and a red-bordered 'Reopen' button. Two overlapping dialog boxes are present: a 'Message Box' asking 'Are you sure you want to reopen this request?' with 'Yes' and 'No' buttons, and an 'Add Activity Log Entry' dialog with a 'Notes' field and a 'Save' button. A red arrow points from the 'Reopen' button to the 'Yes' button in the message box.

Request Number	Request Name	Status	Product / Servi...	Requested For ...	Submit Date
INCBW0000004749	Summary included	Completed	BTC	ali@test.zzz	14.12.2012 19:41:44
INCBW0000004721	Summary Germany 2	Planning		gareth@test.vvv	12.12.2012 12:10:38
INCBW0000004720	Summary Sweden 2	Planning		susanne@see.ccc	12.12.2012 12:09:43
INCBW0000004714	Include Summary here	Planning		susanne@see.ccc	12.12.2012 11:02:09

Summary For: INCBW0000004749

Notes:

Attachment 1:

Attachment 2:

Attachment 3:

Add

Request Details Complete Request Cancel Reopen

Message Box (429258-pictor) - Windows Internet Explorer

bmcsoftware

Are you sure you want to reopen this request?

Yes No

Add Activity Log Entry (429258-pictor) - Windows Internet Explorer

Service Request Work Info

Notes* <type your activity log text here>

Attachment <File Name>

Save

Reporting Service Requests



Running the report

- 1) Click link Reporting
- 2) Add selection criteria:
 - **Status**

You can select multiple statuses by holding down Ctrl button and selecting required statuses.

- **Date range**

Type the Submit Date Range for the Service Requests you want to report.

- 3) Click OK button to open the report.

The screenshot shows the Basware web interface. On the left, the 'Submitted Requests' sidebar lists categories like 'Needs Attention' (16), 'Drafts' (0), 'Since Last Visit' (0), and 'Open Requests' (16). Below this, 'Popular Services' includes 'Browse Catalog', 'Performance', and 'Reporting' (highlighted with a red box). The main area displays a 'Parameters' dialog box for selecting status and date range. The status list includes 'Assigned', 'Cancelled', 'Closed', 'Completed', 'Draft', 'In Progress', 'Pending', 'Pending Basware', 'Pending Customer', and 'Submitted'. The date range is set from '2013-04-23' to '2013-05-23'. A red arrow points from the 'Reporting' link in the sidebar to the 'Parameters' dialog box. Below the dialog box, there are fields for 'Attachment 1', 'Attachment 2', and 'Attachment 3', each with a file name input and a file icon. At the bottom, there are buttons for 'Request Details', 'Complete Request', 'Cancel', and 'Reopen'. On the right, a 'Request Report' window is open, showing a table of request data. A red arrow points from the 'Parameters' dialog box to the 'Request Report' window. The table has columns: Request Number, Request Name, Product / Service, Requested For Login ID, Status, Submit Date, and Last Updated. The data includes requests for 'Summary Norway', 'Summary Germany', 'Summary Sweden', 'Include Summary here', 'Summary Sweden 2', 'Summary included BTC', 'Summary Finland by Jori', 'Summary Banking 8.3', 'Test Summary', 'Error Report', and 'Error Report'.

Request Number	Request Name	Product / Service	Requested For Login ID	Status	Submit Date	Last Updated
INCBW00000004707	Summary Norway		ali@test.zzz	Closed	12 12 2012 10:40	
INCBW00000004711	Summary Germany		gareth@test.vw	Closed	12 12 2012 10:46	
INCBW00000004712	Summary Sweden		susanne@see.ccc	Closed	12 12 2012 10:48	21.5 2013 12:53
INCBW00000004714	Include Summary here		susanne@see.ccc	Pending Basware	12 12 2012 11:02	21.5 2013 12:52
INCBW00000004720	Summary Sweden 2		susanne@see.ccc	Closed	12 12 2012 12:09	21.5 2013 12:51
INCBW00000004749	Summary included BTC		ali@test.zzz	Closed	14 12 2012 19:41	
INCBW00000004757	Summary Finland by Jori	eOffice 8.3	ori@test.zzz	Closed	19 12 2012 11:06	
INCBW00000004790	Summary Banking 8.3		susanne@see.ccc	Completed	3 1 2013 15:01	21.5 2013 12:49
INCBW00000004796	Test Summary		susanne@see.ccc	In Progress	10 1 2013 15:17	21.5 2013 12:48
INCBW00000004796	Error Report		ali@test.zzz	Draft	14 12 2012 17:37	
INCBW00000004796	Error Report		gareth@test.iff	Draft	25 2 2013 12:38	

Showing page 1 of 1

14.12.2012 17:32:39 ; Ali E United States (ali@test.zzz)
Please find some additional information from the attachment
[Attachment 3.docx](#)

Saving report to the file / printing

Report can be

- **Saved to the file** for further processing and presenting. Preferred file format can be selected to Export Format field.
- **Printed**

for further
presenting.
at can be
Format

The screenshot shows a web application interface with a table of request reports. The table has columns for Request Number, Request Name, and other details. Two dialog boxes are open: 'Print Report' and 'Export Report'. The 'Print Report' dialog has options for 'All pages', 'Current page', and 'Sivut:'. The 'Export Report' dialog has an 'Export Format' dropdown set to 'Excel' and options for 'All pages', 'Current page', and 'Sivut:'. A red arrow points from the 'Print' icon in the top toolbar to the 'Print Report' dialog.

Request Number	Request Name	Pro
INCBW0000004707	Summary Norway	
INCBW0000004711	Summary Germany	
INCBW0000004712	Summary Sweden	

22.5.2013 16.11

User Preferences



SRM User Preferences

Managing User Preferences

You can select the view that opens when you login to the system or when you click the Home button



- Click **Preferences**. In the **Initial Console View** selection list you can choose the desired view.
- To set the default search criteria, choose a value from the **Show** selection list and from the **Recently Closed Requests** fields.

You can change your SRM password by clicking **Change Password**.

The screenshot shows the 'basware' SRM interface. On the left, a sidebar contains 'Submitted Requests' (Needs Attention: 16, Drafts: 0, Since Last Visit: 0, Open Requests: 16) and 'Popular Services' (Browse Catalog, Preferences, Reporting). The 'Preferences' link is highlighted with a red box. A red arrow points from this box to the 'Initial Console View' dropdown menu in the 'General Console Information' section of the 'Service Request Management User Preferences' window. The window also shows 'Accessed Console Last' (14.12.2012 16:42:15), 'Submit Confirmation' (Service Categories), 'Broadcast Auto Popup' (Never), and 'My Requests' (Show: All Open Requests, Recently Closed Requests: 7 Days). A 'Change Password' button is visible at the bottom right of the preferences window.

How to Report SRM related Support Requests?

Create Error Report, Enhancement Request, Service Request or Inquiry from SRM:

1. Select the right Service Category, e.g. Inquiry
2. Fill Summary, Description, Impact and Urgency fields
3. Select 'SRM' to the Service/Product field
4. Submit the request

In case you are not able to login to the SRM please contact your local Service Desk. Customer Support Contact details can be found from here:

<http://www.basware.com/about-us/contact/support>



Questions?

Link to SRM: <http://srm.basware.com>

More information:

[SRM User Guide](#)

[SRM Video tutorial](#)

Contact your Service Desk:

<http://www.basware.com/about-us/contact/support>



Scan and Capture Service specific Service Requests

Original request
Feedback
Rescan request



Scan and Capture Service specific Service Requests as a Service Category

Service Categories

**Problem Report**

Through this Problem Report icon You can report Product / Service related failures and errors. Click this icon to continue.

List Related Services »

**Scan & Capture**

Scan & Capture

List Related Services »

**Service Request**

Through this Service Requests icon You can report Product / Service related Service Requests, Inquiries and Enhancements. Click this icon to continue.

List Related Services »

Available Service Requests:

- Giving feedback about the quality
- Requesting original documents to be posted back
- Requesting re-scan from the scanning partner



S&C Feedback

Scan & Capture Feedback form

[Add to Favorites](#) | [Details...](#)



S&C Original Request

Scan & Capture original request

[Add to Favorites](#) | [Details...](#)



S&C Rescan Request

Scan & Capture rescan request

[Add to Favorites](#) | [Details...](#)

Scan and Capture feedback

Contact Basware

Provide Information

S&C Feedback

Click the hyperlink to view instructions and to download the feedback form

Instructions

Click [here](#) for instructions
Click [here](#) for feedback form

Submit the request to Basware Support

Add the feedback form as an attachment

Add AttachmentSummary

Save As DraftSubmit

Scan and Capture original request

Contact Basware

Provide Information

S&C Original Request

Name

Instructions
Click [here](#) for instructions

Fill in the return address, Scan Service ID's and submit the request. Check instructions if you need assistance locating the Scan Service ID

Return address

Company name*

Street address*

ZIP code*

City*

Country*

Scan Service ID 1*

Summary

Save As Draft

Submit

Scan and Capture rescan request

Contact Basware

Provide Information

S&C Rescan Request

Name

Instructions
Click [here](#) for instructions

Fill in the mandatory fields and submit the request. You can choose "other" as the reason to get a free text field

Scan Service ID 1*

Rescan reason*

Scan Service ID 2

Rescan reason

Scan Service ID 3

Rescan reason

Scan Service ID 4

Summary

Save As Draft Submit

Questions?

Scan and Capture, request specific instructions

http://www.basware.com/sites/default/files/upload/original_request.pdf

http://www.basware.com/sites/default/files/upload/feedback_form.pdf

http://www.basware.com/sites/default/files/upload/rescan_request.pdf

Support:

<http://www.basware.com/about-us/contact/support>



Multi-company features for Extended Support customers



SRM Multi-company features

SRM user can have special user rights to multiple companies:

1. Service Request creation to selected company
2. Visibility to all Service Request and company specific search
3. Report creation per company / companies

Please note: Multi-company feature is an extra feature and requires system configuration – please contact your Service Manager or Service Desk.

SRM Overview Console

1) Quick links to all Submitted requests

2) Link to SRM Home

3) Showing Service Requests with selected search criteria

4) Adding notes and attachments to the Activity log

5) Activity Log shows the communication between customer and Basware

6) Link to Basware Customer Support Contact details

7) Link to Help pdf file (=Customer User Guide)

8) Refresh the screen

9) Incident search with Incident ID

10) Search with Company

The screenshot displays the Basware SRM Overview Console interface. The top navigation bar includes the Basware logo, a welcome message for 'Susanne S Sweden', and links for 'Help' and 'Logout'. A left sidebar contains a 'Submitted Requests' section with links to 'Needs Attention' (16), 'Drafts' (0), 'Since Last Visit' (0), and 'Open Requests' (16). Below this are links for 'Popular Services', 'Browse Catalog', 'Preferences', and 'Reporting'. An 'Incident ID+' search field is also present. The main content area features a 'Submitted Requests' table with columns for Request Number, Request Name, Status, Product / Ser..., Requested F..., Submit Date, and Last ... The table lists several requests, with the last one selected. Below the table is a 'Summary For: INCBW0000004721' section. This section contains a 'Notes' field with a placeholder '<type> activity log text here', an 'Attachment' section with three slots for file uploads, and an 'Add' button. To the right of the attachments is an 'Activity Log' section showing a timeline of messages, including one from 'Puro-Grönblom Johanna (johannap)' and another from 'Ali E United States (ali@test.zzz)'. The bottom of the interface has buttons for 'Request Details', 'Complete Request', 'Cancel', and 'Reopen'. Numbered callouts 1 through 10 highlight specific UI elements corresponding to the numbered list on the left.

basware Welcome, Susanne S Sweden Help Logout

Submitted Requests

Needs Attention 16
Drafts 0
Since Last Visit 0
Open Requests 16

Popular Services
Browse Catalog
Preferences
Reporting

Incident ID+ 9

Submitted Requests

Request Number	Request Name	Status	Product / Ser...	Requested F...	Submit Date	Last ...
INCBW0000004708	Summary France	Assigned		gareth@test.fff	12.12.2012 10:41:59	
INCBW0000004709	Summary US	Assigned		ali@test.zzz	12.12.2012 10:44:49	
INCBW0000004710	Summary Finland	Assigned		jon@test.zzz	12.12.2012 10:45:44	
INCBW0000004713	SP (netherlands)	Assigned		gareth@b.zzz	12.12.2012 10:53:39	
INCBW0000004715	Summary Netherlands	Assigned		gareth@b.zzz	12.12.2012 12:04:22	
INCBW0000004716	Summary Denmark 2	Assigned		elif@ggg.ttt	12.12.2012 12:05:27	
INCBW0000004717	Summary Norway 2	Assigned		elif@test.zzz	12.12.2012 12:06:54	
INCBW0000004718	Summary US 2	Assigned		ali@test.zzz	12.12.2012 12:07:50	
INCBW0000004719	Summary Finland 2	Assigned		jon@test.zzz	12.12.2012 12:08:41	
INCBW0000004721	Summary Germany 2	Assigned		gareth@test.vvv	12.12.2012 12:10:38	
INCBW0000004722	Summary France 2	Assigned		gareth@test.fff	12.12.2012 12:11:34	

Summary For: INCBW0000004721

Notes:
<type> activity log text here

Attachment 1: <File Name>
Attachment 2: <File Name>
Attachment 3: <File Name>
Add

Activity Log:
27.12.2012 15:28:38 ; Puro-Grönblom Johanna (johannap)
This message from the Service Desk
14.12.2012 17:35:07 ; Ali E United States (ali@test.zzz)
I will contact you today regarding this issue
14.12.2012 17:32:39 ; Ali E United States (ali@test.zzz)
Please find some additional information from the attachment
Attachment 3.docx

Request Details Complete Request Cancel Reopen

1. Service Request creation to selected company

Select the right company from the selection list

Fill in Service Request fields:

- **Summary** = brief summary of the issue
- **Description** = Describe what has happened and how that can be reproduced
- **Product / Service selection** = Select the right Product / Service from the selection list.

Note! Selection list shows only those services that belong to the selected company.

- **Impact and Urgency** = Select the value from the selection list.

The image displays two screenshots of the 'Service Request' form. The top screenshot shows the form with 'Company*' set to 'Test Customer 3'. The bottom screenshot shows the form with 'Company*' set to 'Test Customer 4' and 'Product / Service selection*' set to 'IP Test'. A red box highlights the 'Submit' button in the bottom screenshot.

Service Request.

Name: Tina Tester

Company*: Test Customer 3

Summary*:

Description*:

Product / Service selection*:

Urgency*:

Add Attachment Summary

Service Request.

Name: Tina Tester

Company*: Test Customer 4

Summary*: Summary

Description*: Description

Product / Service selection*: IP Test

Urgency*: e-Invoice Basic for Receiving

Add Attachment Summary

Save As Draft Submit



2. Visibility to the Service Request

Submitted Requests listing shows all Service Requests of all companies SRM user belongs to.

As default all companies' Service Requests are shown in the 'Submitted Requests' summary.

User can filter certain company's Service Requests by selecting the Company from the selection list from the right corner.

Select Clear from the selection list to view all companies Service Requests again.

The screenshot displays the Basware Submitted Requests interface. The top navigation bar includes the Basware logo, a welcome message for Tina Tester, and links for Help and Logout. The main content area is titled 'Submitted Requests' and features a sidebar with navigation links: Submitted Requests (highlighted), Needs Attention (10), Drafts (1), Since Last Visit (0), and Open Requests (31). The main table lists submitted requests with columns for Request Number, Request Name, Status, Product / Service, Requested From, and Submitted. A dropdown menu for 'Company' is visible, showing a list of companies: Test Customer 3, Test Customer 4, Test Customer 5, and a 'Clear' option. The table data includes requests for various products like e-Invoice Basic for bss, IP Test, and ITSM Incident Management.

Request Number	Request Name	Status	Product / Service	Requested From	Submitted
INCBW0000081709	Summary	Assigned	e-Invoice Basic for bss	bss.itsm.testing@gr	16.3.2013 10:17:32
INCBW0000081602	testtest	In Progress	IP Test	ann@foo.com	20.3.2013 10:17:32
INCBW0000081408	test 2	Pending Basware	Printing	suvi.testaalee@test	14.3.2013 10:17:32
INCBW0000081407	test	In Progress	Printing	suvi.testaalee@test	14.3.2013 10:17:32
INCBW0000081123	Viewing incident opens up incident search	In Progress	e-Invoice Basic for bss	suvi.testaalee@test	9.7.2013 16:04:33
INCBW0000081005	test	Pending Basware	ITSM Incident Management	suvi.testaalee@test	19.6.2013 13:43:17
INCBW0000025102	Summary	Assigned	IP Test	bss.itsm.testing@gr	4.2.2013 10:17:32
INCBW0000014657	This is a summary for enhancement request	Pending	IP Test	bss.itsm.testing@gr	8.1.2013 14:27:09
INCBW0000012368	Error Report by Tina	Assigned	IP Test	bss.itsm.testing@gr	2.1.2013 15:36:02
INCBW0000012363	Enhancement Tina Testaaja	In Progress	IP Test	bss.itsm.testing@gr	2.1.2013 15:34:26
INCBW0000011147	Summary tero	Assigned	IP Test	bss@luukku.com	27.12.2012 16:29:11

3. Running the report

- 1) Click link Reporting
 - 2) Add selection criteria:
- **Company**

You can select multiple companies by holding down Ctrl button and selecting required statuses.

- **Status**

You can select multiple statuses by holding down Ctrl button and selecting required statuses.

- **Date range**

Type the Submit Date Range for the Service Requests you want to report.

- 3) Click OK button to open the report.

basware Welcome, Susanne S Sweden Help Logout

Submitted Requests

Needs Attention 16
Drafts 0
Since Last Visit 0
Open Requests 16

Popular Services
Browse Catalog
Product Catalog
Reporting

Submitted Requests Show All Open Requests

Request Number Request Name Status Assigned
INCBW0000004708 Summary France

Parameters

Parameters marked with * are required.

Company:
Test Customer 3
Test Customer 4
Test Customer 5

Status:
Assigned
Canceled
Closed
Completed
Draft
In Progress
Pending
Pending Basware
Pending Customer
Submitted

Request Submit Date (Please Enter date Values as YYYY-MM-dd):
2013-08-16

Attachment 1: <File Name>
Attachment 2: <File Name>
Attachment 3: <File Name>
Add

Request Details Complete Request Cancel Reopen

Request Report - Windows Internet Explorer

Showing page 1 of 1

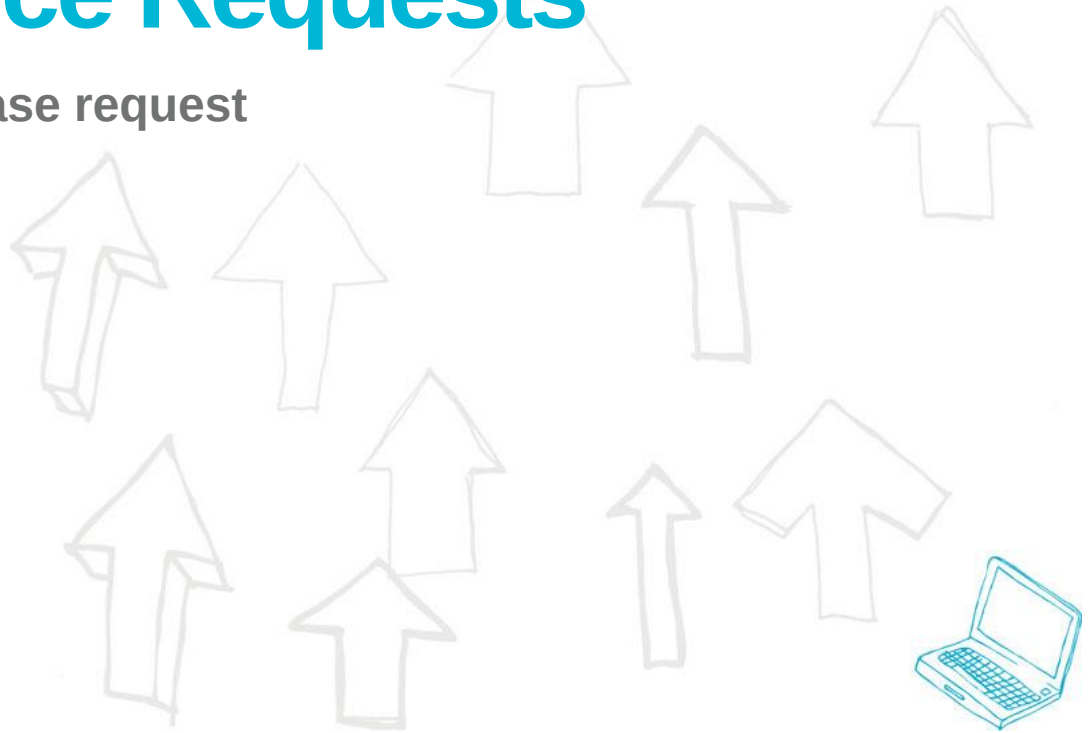
Request Number	Request Name	Product / Service	Requested For Login ID	Status	Submit Date	Last Updated
INCBW0000004707	Summary Norway		ali@test.zzz	Closed	12.12.2012 10:40	
INCBW0000004711	Summary Germany		gareth@test.vw	Closed	12.12.2012 10:46	
INCBW0000004712	Summary Sweden		susanne@see.ccc	Closed	12.12.2012 10:48	21.5.2013 12:53
INCBW0000004714	include Summary here		susanne@see.ccc	Pending Basware	12.12.2012 11:02	21.5.2013 12:52
INCBW0000004720	Summary Sweden		susanne@see.ccc	Closed	12.12.2012 12:09	21.5.2013 12:51
INCBW0000004749	Summary included BTC		ali@test.zzz	Closed	14.12.2012 19:41	
INCBW0000004757	Summary Finland by Jett	Office 8.3	lori@test.zzz	Closed	19.12.2012 11:06	
INCBW0000004790	Summary	Banking 8.3	susanne@see.ccc	Completed	3.1.2013 15:01	21.5.2013 12:49
INCBW0000004795	Test Summary		susanne@see.ccc	In Progress	16.1.2013 15:17	21.5.2013 12:48
	Error Report		ali@test.zzz	Draft	14.12.2012 17:37	
	Error Report		gareth@test.ii	Draft	25.2.2013 12:38	

12.12.2012 17:35:07 ; Ali E United States (ali@test.zzz)
ill contact you today regarding this issue

14.12.2012 17:32:39 ; Ali E United States (ali@test.zzz)
Please find some additional information from the attachment
Attachment 3.docx

Standard SaaS Service specific Service Requests

Citrix hanging session release request
IP user import
Password reset



Standard SaaS Service specific Service Requests as a Service Category

The screenshot displays the Basware user interface. At the top, the 'basware' logo is on the left, and 'Welcome, Echo Echo' and 'Help Logout' are on the right. Below the logo, a 'Submitted Requests' sidebar lists 'Needs Attention' (0), 'Drafts' (0), 'Since Last Visit' (0), and 'Open Requests' (0). The main area is titled 'Service Categories' and contains four service cards: 'Problem Report', 'Scan & Capture', 'Service Request', and 'Standard SaaS'. The 'Standard SaaS' card is highlighted with a red border. Each card includes a lightbulb icon, a title, a description, and a 'List Related Services »' link. The 'Standard SaaS' description states: 'Through this Standard SaaS icon you can report Basware Standard SaaS Requests. Click icon to continue.' At the bottom left, there is an 'Incident ID+' field.

Submitted Requests

- [Needs Attention](#) 0
- [Drafts](#) 0
- [Since Last Visit](#) 0
- [Open Requests](#) 0

[Popular Services](#)
[Browse Catalog](#)
[Preferences](#)
[Reporting](#)

Incident ID+

Service Categories

Problem Report
Through this Problem Report icon You can report Product / Service related failures and errors. Click this icon to continue.
[List Related Services »](#)

Scan & Capture
Scan & Capture
[List Related Services »](#)

Service Request
Through this Service Requests icon You can report Product / Service related Service Requests, Inquiries and Enhancements. Click this icon to continue.
[List Related Services »](#)

Standard SaaS
Through this Standard SaaS icon you can report Basware Standard SaaS Requests. Click icon to continue.
[List Related Services »](#)

[Contact Basware](#)

Available Service Requests:

- Releasing hanging Citrix sessions
- Importing users into Basware IP
- Resetting a password for Citrix or a Basware application

 Citrix hanging session re... User Citrix hanging session reset request Add to Favorites Details...	 IP User import IP user import request and link to standard user import excel template Add to Favorites Details...	 Password Reset User password reset request for Citrix or Basware Application Add to Favorites Details...
---	--	---

Citrix hanging session release

The screenshot shows a web form titled "Citrix hanging session release request" under the "Provide Information" section. The form includes a "Name" field with the value "Echo Echo", an "Instructions" section with a red warning "Use English only!!" and a link "Click here for instructions.", and three required input fields: "User can't access the application:*" (a dropdown menu), "Basware SaaS Citrix Login id: *" (a text field), and "Additional information *" (a text area). At the bottom, there are buttons for "Summary", "Save As Draft", and "Submit". Red arrows point from external text boxes to the "Click here" link, the "Basware SaaS Citrix Login id" field, and the "Submit" button.

Provide Information

Citrix hanging session release request

Name Echo Echo

Click the hyperlink to view instructions

Instructions

Use English only!!
Click [here](#) for instructions.

User can't access the application:*

Basware SaaS Citrix Login id: *

Additional information *

Submit the request to Basware Support

Summary Save As Draft Submit

Specify the service affected and the Citrix login id to release

IP User import

Contact Basware

Provide Information

IP User import

Name

Echo Echo

Click the hyperlink to view instructions and retrieve IP user import form

Instructions

Use English only!!

Add filled IP user import form to Attachment.
Click [here](#) for instructions.

Submit the request to Basware Support

Additional information

Add Attachment

Summary

Save As Draft

Submit

Add IP user import form as an attachment

Password Reset

The screenshot shows a web form titled "Password Reset" within a "Provide Information" section. The form includes a "Name" field with the value "Echo Echo", an "Instructions" section with a red warning "Use English only!!" and a link "here", and several required fields: "User can't access the application:*" (dropdown), "User need password reset for: *" (dropdown), "User login ID*" (text), and "Additional information" (text area). At the bottom are buttons for "Summary", "Save As Draft", and "Submit". Red arrows point from text annotations to the "here" link, the "User login ID*" field, and the "Submit" button.

Provide Information

Password Reset

Name Echo Echo

Click the hyperlink to view instructions

Instructions

Use English only!!
Click [here](#) for instructions.

User can't access the application:*

User need password reset for: *

User login ID*

Additional information

Submit the request to Basware Support

Summary Save As Draft Submit

Fill in the service affected, the application involved and the user id for which to reset the password